

THE HONG KONG INSTITUTION OF ENGINEERS

CONFERENCE MANUAL

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PREFACE

This Manual serves as a good practice guide for conference organisers. It also defines the authority and the reporting procedure for organising both Institution and Division conferences.

Organisers of seminars and congresses will also find this Manual useful as the organising committee structure and planning process will be similar to those for organising conferences. Apart from the authority and the reporting procedures, which should be in line with the HKIE policy, variations from those prescribed for organising conferences might be necessary and would thus be allowed to suit individual events.

1. DEFINITIONS

1.1 Conferences

Conferences are normally defined as meetings for knowledge sharing:

- lasting two to five days;
- having a call for papers which are refereed or reviewed on their suitability for publication in Conference Proceedings

1.2 Seminars

Seminars are normally defined as meetings for knowledge sharing:

- lasting one day, occasionally two days; or on a more specific topic than a conference;
- not having a call for papers; speakers are invited directly by the 'Organising Committee' from their knowledge of the speakers;
- papers are not refereed and are not printed as proceedings;

Seminars will require much shorter preparation time and effort than conferences.

1.3 Congresses

Congresses are multi-seminar or multi-stream conference events lasting 3-4 days and supported by a substantial exhibition.

1.4 Symposiums

Symposiums are formal meetings held to discuss a particular subject, especially an academic subject.

2. The HKIE POLICY

The HKIE aims to provide conferences of a high international standard whilst at the same time to ensure that the total event programme is self-financing. To these ends the following objectives shall be met:

2.1 Technical and Professional Standard

All technical papers presented should be of a high standard.

To achieve this, all technical papers must be reviewed by two specialist referees, who are knowledgeable in the topic under discussion, of whom one must be a member of the Organising Committee and/or a member of the Technical Programme Sub-committee.

Statement:

The term "Conference" as mentioned in the text should also refer to seminar, congress and symposium.

2.2 Quality of the Conference

The Conference should be organised to the highest practical quality possible and consistent with the conference objectives.

This, to a large extent, is attributed to careful planning of the technical programme, social programme, venue, accommodation and logistics. For international conference, high quality of services should be emphasised to demonstrate the hospitality of Hong Kong and the HKIE as the host of the conference.

2.3 Conference Finance

Conference finance must aim to breakeven.

A budget should be carefully devised and should be submitted to the Administration Board via the Conference Committee. The Administration Board should ensure that the Institution is capable of, and willing to, taking the financial risk before giving its approval.

The HKIE requires that all conference expenses, including the cost of salaries and overheads for the Conference & Function Section, must be recovered from the conference income. The income part should include the delegates' registration fees and sponsorships, which should reflect the market rate and the economic situation.

Report on the income and expenditure should be submitted to Administration Board through the Conference Committee.

2.4 Scope

The HKIE will maintain maximum flexibility for the Organising Committee to achieve the conference objectives.

The Institution will provide all necessary resources and financing required by and for the conference according to plans and budget as approved by the Administration Board.

3. ORGANISING COMMITTEE AND ITS RESPONSIBILITIES

3.1 Responsibilities for Organising Conferences

The Learned Society Board is responsible for the technical aspect and the professional outcome of the conference whereas the Administration Board is to take care of the resources matters (including finance) of the event. The Organising Committee Chairman should report to the Conference Committee, which is accountable to the Learned Society Board and the Administration Board.

3.2 Formation of Organising Committee

The Organising Committee Chairman has to be knowledgeable in almost every detail of the conference. It is also important that he has a good command of the conference subject. He should also be a motivator and an accomplished administrator. As the chief executive, he is answerable for the technical, professional and financial success of the conference. He must be a Corporate Member of the HKIE.

Members of the Organising Committee should support the Chairman with specific expertise and knowledge of the people working in their field. It is more efficient to have sub-committees responsible for different aspects of the Conference. The following key areas should be addressed and if necessary the relevant sub-committees may be formed:

- Technical Programme
- Sponsorship/Exhibition
- Publication
- Publicity
- Social Programme
- Finance

Chairmen of respective sub-committees can be nominated and selected from the Organising Committee.

It is suggested that all sub-committees should meet regularly to ensure the smooth planning of conference activities.

An external conference secretariat may be hired to assist in the organisation of the conference when deemed necessary.

3.3 Link to HKIE Secretariat and other Committees

The Organising Committee of any Institution Conference shall liaise with the Conference Committee on all administrative matters through the HKIE Conference & Function Manager and the Chief Executive and Secretary. The Organising Committee must include a HKIE Secretariat member (usually the Conference & Function Manager) to consult on policy issues and to maintain a continuous link between the Administration Board, Learned Society Board and Conference Committee.

3.4 Promotion

Each conference should be effectively promoted. The Organising Committee should provide as much information as possible for the promotion purpose and to actively and aggressively participate in publicising the event. The promotion may include:

- * Developing a promotion plan in the early stages of conference organisation.
- * Press releases, mail shots and advertising are key elements of any conference promotion plan. While the Secretariat would assist with the drafting, selection, timing and placing all of the above, Organising Committee members, with their specialised knowledge of the conference subjects and markets, are advised to involve actively in promoting the event.
- * Word of mouth is an important medium. Speakers and co-authors may comprise a sizeable proportion of the delegates and can help to publicise the conference, and in turn the image of the HKIE, to their colleagues. The Organising Committee could identify a list of people at senior levels to whom personal letter with conference information from the Organising Committee Chairman could be sent to promote the conference.
- * The Organising Committee can identify a list of relevant external organisations and bodies and invite them as supporters to the conference. These supporting organisations are usually, with no financial commitment, able to help disseminate the information to their members who may be interested in attending the conference. Promotion can also be made via Divisions of the HKIE.
- * It is advisable to set up a web page for the conference linked to HKIE website.

3.5 Financial Viability

A budget for each conference should be prepared. A preliminary budget should be submitted to the Conference Committee and the Administration Board for approval. Any material increase in costs, fees or change in the basic format (say variation of 10% or more) will require endorsement by the Conference Committee and the Administration Board.

The budget once approved by the Administration Board should be adhered to. It is the Organising Committee Chairman's responsibility, with the advice of the Conference Committee, to ensure that expenditure is held within what has been formally approved.

The following factors will all add to the cost of a conference, constitute to increase in delegate fees and hence the financial risk to the HKIE:

- **Expensive venues**
- **Excessively long conference duration**
- **Too many authors**
- **Too many papers**
- **Excessive quantity of publications**
- **Excessive concessions to guests, authors and speakers**
- **Too many non-paying guests (speakers and press)**
- **Excessive but undercharged social events**
- **Excessive level of complimentary services**

The budget should be comprehensive and accurate as far as possible drawn from previous experiences and records. Seeking competitive quotes for items is good practice for controlling costs.

Offer of complimentary registrations should be carefully considered and should be included in the budget. The Organising Committee should decide and give clear guidelines for reimbursement of expenses to guest speakers (especially those from overseas) as this may form a major part of the expenditures.

A shortfall in the number of delegates can seriously affect the recovery of costs, as a large proportion of the conference expenditure often including reserved accommodation, refreshments and banquets is fixed. A delegate shortfall can result in a penalty being charged by the venue providers unless bookings can be modified or cancelled well in advance. It is important that the Organising Committee is aware of any such circumstances and can give timely alert to the Conference Committee and the Administration Board of possible financial short falls.

3.6 Sponsorship

Sponsorship, subsidies or grants are welcome but they should not compromise the HKIE in any way. Such contributions will generally come from commercial organisations, government-funded bodies or government departments. The potential sponsors should be identified and approached by members of the Organising Committee. A sponsorship programme should be devised detailing the packages available and their costs. Level of recognition should be mutually agreed by the Organising Committee and the sponsors. Any such agreements should be obtained in writing.

Negotiating sponsorship packages can take some time and it is important for the Organising Committee to consider sources of sponsorship at an early stage.

3.7 Work Plan

It is recommended that the Organising Committee to develop a work plan at an early stage. A well-developed plan will guide the Organising Committee through the many decisions that must be made, and will assist in identifying priorities. The work plan should be reviewed and monitored on a regular basis to ensure timely actions for organisation of the conference.

Experience shows call for papers, review of papers by referees and printing of papers can take up to 15 months, and a further 2 to 5 months for a major international event.

Registration document should normally be issued at least three months before the conference with a follow-up reminder notice four weeks before the event. Major international events may require the registration document to be despatched even earlier.

3.8 Theme, Scope, Aims and Technical Programme

The theme, scope and aims should be carefully defined by the Organising Committee. These will provide guidance to the the design of the technical programme and other planning activities.

The Technical Programme is heart to the conference and should therefore entail the setting up of a Technical Programme Sub-committee comprising of experts in the field.

4. PLANNING AND ORGANISING A CONFERENCE

4.1 Venue and Date

It is recommended that the time and place be carefully considered to suit the requirements of the target participants. The date of the conference should avoid clashing with other events of similar nature and generally be kept clear of summer holidays. In regard to the duration, it is advisable to aim for two or three days. A major international conference may need to be slightly longer.

Venue selection requires in-depth evaluation. Site inspections are a must. A suitable venue should be able to provide quality services of catering and audio-visual equipment support. The venue should meet the requirement of the programme in regard to the space, set up and facilities available.

For international conferences, careful consideration should be given to the selection of official hotel(s). More than one official hotel can be selected in order to provide potential delegates with the choice of accommodation at different rates. The official hotel(s) should be located in close proximity to the conference venue. It is important to find a suitable standard of accommodation relevant to delegates' expectations and experience.

4.2 Registration Fees and Policy

Registration fees should be set out to reflect the market rate and the affordability of the target participants. A number of registration categories can be worked out to meet the needs of different groups, namely, Normal Registration, Group Registration (e.g. for more than 5 delegates from one organisation), Day Registration and Student Registration. An early bird discount (usually 10% of the normal registration fee) can be offered to attract early registrations and the deadline is usually set around two months before the conference. However, the Organising Committee should consider carefully as to the implication of these categories to the budget.

In setting the registration fee, the Organising Committee should aim at a breakeven budget. A provision say 5% - 15% of the total budget should be made for all possible contingencies.

The Organising Committee should also consider the entitlements to be offered. Usually the registration fee for an international conference will cover the following items:

- Attendance of the full programme
- One set of conference kit which contains a copy of the conference handbook and conference proceedings
- Coffee/tea breaks throughout the conference period
- Lunches (or by ticket)
- Dinner and other social events (or by ticket)
- Technical visits (or by ticket)

Registration policy, rules and regulation should be specified in the registration document. Whether a refund will be made for cancellation of registration should be stated and usually only a cancellation made in writing should be entertained. Registrations are usually subject to acceptance on a first-come-first-served basis and are subject to the receipt of full fee.

It needs to state clearly if authors or presenters of papers are required to pay registration fees. If the conference is to attract high quality technical presentation, considerations might be given to waive the need for registration fees by authors or presenters.

4.3 Conference Language

Although English is commonly adopted by most of the international conferences, the Organising Committee should consider carefully the official language(s) for a particular conference. The target participants and their language capabilities should be taken into consideration. In selection of overseas speakers, careful consideration should be given if English (or the official language) is not their first language. Not every conference can afford the costs of providing simultaneous interpretation services.

4.4 Publications

One of the major tasks of the Organising Committee is to design and produce a number of publications for the purpose of promoting the conference or reporting on the conference:

Publications	Important Contents
Call for Papers	<ul style="list-style-type: none"> ➤ Introduction ➤ Date and duration ➤ Theme and topics ➤ Official language ➤ Organisers, co-organisers and supporting organisations ➤ Organising committees and Conference Secretariat ➤ Invitation of abstracts ➤ Requirement and specifications for the abstracts ➤ Various submission deadlines
Registration Brochure	<ul style="list-style-type: none"> ➤ Conference venue ➤ Announcement of guest of honour, keynote speakers and other important speakers ➤ Programme schedule ➤ Technical visit information ➤ Organisers, co-organisers and supporting organisations ➤ Organising committees and Conference Secretariat ➤ Social programme ➤ Acknowledgements (if appropriate) ➤ Cancellation policies ➤ Contingency of bad weather <p><i>For international conferences, the following information should also be provided:</i></p> <ul style="list-style-type: none"> ➤ <i>Tours/accompanying persons programme</i> ➤ <i>Conference hotels</i>

	<ul style="list-style-type: none"> ➤ <i>Location map of the conference venue</i> ➤ <i>General information on the city where the conference is being held</i>
Conference Handbook	<ul style="list-style-type: none"> ➤ Messages from guest of honour, Conference Chairman and other key persons ➤ Notes to delegates ➤ Full programme schedule with details of the dates, time and presentation topics ➤ Brief biographies of speakers (if available) ➤ Abstracts of presentations (if available) ➤ Organisers, co-organisers and supporting organisations ➤ Organising committees and Conference Secretariat ➤ Acknowledgments <p><i>For international conference, the following information should also be provided:</i></p> <ul style="list-style-type: none"> ➤ <i>Map of conference venue</i> ➤ <i>Tours schedule</i> ➤ <i>Useful telephone numbers</i>
Conference Proceedings	<ul style="list-style-type: none"> ➤ Table of contents ➤ Foreword (if available) ➤ Full technical papers ➤ Organisers, co-organisers and supporting organisations ➤ Acknowledgement to editors and other relevant parties ➤ Index (if available)

The official language should be adopted consistently throughout these publications. The Organising Committee can nominate members to form a sub-committee as to maintain the quality use of language in these publications.

All 'Call for Papers' must contain a statement that all papers will be refereed to a high standard as a condition of acceptance. The consent of all the authors should be obtained for permitting the Organising Committee to publish all the abstracts/full papers/materials provided.

'Guidelines on Paper Preparation' should be given to authors whose papers have been selected by the Technical Programme Sub-committee and invited for presentations.

4.5 Technical Programme

The role of the Technical Programme Sub-committee is to define the topics, decide on the programme schedule, encourage submission of abstracts/papers and to vet the full papers. It should be responsible for inviting keynote and guest speakers. The Technical Programme Sub-committee should decide:

- Theme and topics
- Structure of the programme and sessions. A balance between presentation and discussion should be set to encourage the participation of delegates
- Keynote speakers and invited speakers
- Abstracts/papers to be accepted, either as poster or oral presentations
- Presentation schedules, format and guidelines
- Paper preparation guidelines
- Proceedings publication and editorial guidelines
- Appointment of session chairmen and guidelines for chairing the sessions

4.6 Exhibition

Exhibitions can be organised and be held concurrently with a conference. Profile of exhibits should be related to the theme and the scope of topics of the conference. The Organising Committee should decide whether a concurrent exhibition will be held before the conference venue is being selected. Careful consideration should be given as to the costs and the space available for holding an exhibition. There will be a charge to exhibitors to cover the costs of space and services used and this can be treated as part of the incomes to help the financial viability of the event.

4.7 Social Programme

This is an important part of a conference. However, too many social events during a conference can cost considerably. The Organising Committee should consider the expected number of attendance carefully before entering into any agreement with the service provider or the caterer. The social programme should be designed to allow delegates and speakers an opportunity for informal interaction. For an international conference, a good social programme will not only provide a networking opportunity but will also allow delegates to experience the host city.

The registration document should specify clearly whether the conference registration will cover the fee of their participation in any part of the social programme. The Organising Committee should decide whether any social events should be made optional to delegates or to their accompanying persons. Admission will be by ticket and should be prepaid in this case.

4.8 Technical Visits

An interesting and relevant technical visit can contribute greatly to the success of a conference. For local technical visits, these can be arranged in one of the afternoons during the conference period. Technical visits can also be held on the last day as a concluding part of the conference programme.

The registration document should specify clearly whether the technical visits will be covered in the registration fee. If the visits will last for one full day, it is usual for the organiser to provide lunch. The Organising Committee should review carefully the budget, whether provision has been made to cover the costs of transportation, staffing and meals for these visits. In some of the events, these technical visits can be made optional to delegates at a minimal fee. This may help improve the budget and secure the number of attendance for the visits.

Technical visits to other cities in the Mainland or overseas should be carefully planned. A Travel agent should be engaged to give assistance in the planning and logistics. Delegates should be reminded of the validity of their travel document and whether a visa will be required before departure.

4.9 Accompanying Persons

For a major international conference, a programme of visits for accompanying persons can be arranged if this is considered appropriate by the Organising Committee. Participation in the accompanying person programme is usually subject to a fee to cover all the necessary costs. The programme can comprise tours to attractions and the official social events of the conference. For tours, they should be organised with the assistance of a travel agent.

4.10 Insurance Cover

It is important that the registration document should remind delegates of the need to take out appropriate insurance to cover their participation in any of the outdoor visits. The document should also contain the disclaimer such as the HKIE assumes no financial, legal or any responsibility for any type of claim whatsoever arising from their participation. However, the Conference Organising Committee should, in consultation with the Secretariat, ensure that appropriate and sufficient insurance cover has been taken out to reduce the risks of any financial loss or claims which may arise. Insurance policy options available to event organisers usually include: Public Liability; Equipment All-Risks; and Cancellation for Adverse Weather.

4.11 Delegate Questionnaire

The questionnaire will be a useful tool for the Organising Committee to seek comments from the delegates for their experience with the Conference. Their contribution of ideas would be useful for planning of future events. Each delegate can be supplied with a questionnaire in the conference pack. A small incentive such as a promotional gift can assist in encouraging their responses by returning the forms.

4.12 Final Review Meeting

A Review Meeting should be arranged with all the members of the Organising Committee after the event to discuss the organisation, technical and financial aspects of the event. Result of the delegate questionnaires should also be analysed and reviewed. Comments generated would be useful for the evaluation and planning of future conferences. The Organising Committee can also make recommendations to the Institution whether it should support or host the same or similar events in future.

5 PROFESSIONAL CONFERENCE ORGANISER

5.1 Contracting a Professional Conference Organiser

For any conferences particular those of international scale, a Professional Conference Organiser (PCO) may need to be appointed. Whether the Organising Committee will need to secure the service from the Conference & Function Section at the HKIE Secretariat or to appoint an outside company for the services, it is important to decide which of these services are required so that a tender document can be produced and circulated.

A PCO usually specialises in the organisation and administration of conferences and will act as a consultant to the Organising Committee, enacting its decisions whilst utilising the experience and knowledge it has gained over many years in organising events.

Many other companies offer PCO services including travel agents, public relations companies etc. Frequently, the service offered by such companies is partial e.g. destination management. These differ from other PCO in that their core business is not professional conference organisation and, in some cases, they are not impartial due to the nature of their core business.

A PCO can usually offer advice and consultancy based on its experience within the conference industry, whereas others provide only administrative support. It is, therefore, necessary to identify the type and level of service required to ensure that the Organising Committee actually needs a PCO and that the PCO can meet the needs.

A PCO will also act as a link between different committees and suppliers. The Organising Committee will normally retain control of the event and set the policy with the PCO acting as Project Manager and ensuring that the administration runs smoothly. In addition they will provide advice on all aspects of conference management and work with the Organising Committee in partnership to ensure the success of the conference.

It is recommended that a PCO be appointed as early as possible, as their experience and expertise can help avoid the many pitfalls and unnecessary expenditure which are frequently encountered during the early stages of conference planning.

In the earliest stages, a PCO will offer advice, help, knowledge and administrative support in both venue search and feasibility and also in the preparation and presentation of bids to win an international conference. For Hong Kong to bid for international conferences, the Hong Kong Tourism Board could be a potential partner, if appropriate.

In order to identify the most appropriate PCO, it is helpful to seek information from a number of companies. The process would normally involve various steps:

- i) Obtaining of preliminary information on available PCOs
- ii) Production and distribution of a tender document
- iii) Evaluation of tender documents
- iv) Reference checks on prospective PCOs
- v) Presentation and interview
- vi) Selection of PCO

It is important to give PCOs as much information as possible when asking them to tender for a conference. General information on the event and its history will help the PCO decide the type of service that is required. It is equally important to include information on the specific services you require so that the PCO can provide you with an accurate estimate of the fees that they would charge.

Such information should include as a minimum:

- Number of days of the conference
- How frequently the event is held
- Expected number of delegates
- Number of delegates at previous conference in the series
- Expected size of exhibition (if applicable)
- Size of exhibition at previous conference in the series
- Expected number of abstracts/papers to be received

- Expected number of abstracts/papers to be accepted, either as posters or oral presentations
- Number of parallel sessions
- Number of social events
- Registration fee at previous conference in the series if known

A PCO charges for its services. These fees cover the cost of the PCO in administering the event. The Conference Organising Committee should be clear that the fees would cover all the administrative elements or whether separate fees should be quoted for different elements of administration. These would normally cover:

- Sponsorship
- Exhibition sales and management
- Scientific programme management
- Registration
- Social events and supporting programmes
- Accommodation

Some PCOs also make additional service charges on other budget items or receive commission from suppliers and it is helpful to ask companies to outline their policy on these matters.

5.2 The HKIE Conference & Function Section

The Conference & Function Section at the HKIE Secretariat can act in the role of a PCO. The Chief Executive and Secretary and the Conference & Function Manager have a major role to play in the development and organisation of a conference. Their task is to provide the expertise and manpower required in planning, promoting, organising and managing conferences and related events.

Again it is important to decide which of these services are required. The duties should be clearly defined and agreed between the Conference Organising Committee and the Conference & Function Section so that the manpower and resources can be well planned. An administration fee will be charged to the conference budget to recover the salaries and overhead of the Conference & Function Section based on the services required and the scale of the conference. The services may include:

➤ **Secretariat**

The Conference & Function Section will take on the role of manager and hospitality coordinator. This include:

- The establishment of a conference secretariat office to serve as centre of communication and handle all secretarial work from appointment to the completion of the conference.

- Attending meetings of the Organising Committee at reasonable time and frequency, to prepare and distribute notice, agenda and minutes of such meetings to ensure adequate communication with the members.

➤ Programme Management

A well-coordinated programme of lectures and workshops is an essential element of every conference. Specific areas will include:

- Assistance in invitation of keynote speakers.
- Correspondence with speakers.
- Collection of speakers' bio data, abstracts and final papers for the production of conference programme and proceedings.
- Arrangements for speaker transportation and accommodation.
- Coordination of speaker audiovisual equipment requirements.

➤ Participant Management

- Distributing announcements / call for papers and registration brochures to all potential participants.
- Monitoring responses from the potential attendees and handling enquiries.
- Sending invitations to special guests for the opening ceremony.
- Creating a registration database and generating regular reports on the registration status.
- Supervising, receiving, processing and confirming all registrations.
- Preparing lapel badges.

➤ Social Events and Tours

- Planning and implementing the programme for the opening ceremony, welcome reception, lunches and farewell banquet.
- Ensuring the smooth running of the events with reliable suppliers, caterers, decorators and entertainment companies.
- Liaison with the travel agent on the organisation of an accompanying persons programme, optional social programme, pre or post conference tours both within the conference city and to destinations.

➤ Accommodation and Transportation

- Negotiating with, contracting and liaison with travel agents.
- Operation of a hotel booking service for the convenience of conference delegates and accompanying guests.

➤ **Venue / On-site Management**

- Issuing and distributing operation orders to all relevant parties such as venue providers, technicians, suppliers, caterers, and contractors in order to guarantee effective coordination and logistic support.
- Issuing manpower plan and operation run-down including recruitment and training of temporary staff required to operate on-site.

➤ **Printing and Production**

The Conference & Function Section will undertake the preparation, copy writing (except technical or scientific), design, layout, printing and distribution of:

- Call for papers and registration forms
- Conference programme
- Conference proceedings
- Invitation cards
- Gifts or souvenirs
- Conference packs

➤ **Finance**

- Structuring the budget and monitoring status of the income and expenditure.
- Processing payments and issuing receipts.
- Day to day book keeping and accounting services.

➤ **Post Conference**

- Submission of post conference statistics of attendance at the conference.
- Preparation of 'thank you' letters to keynote speakers and special guests.
- Preparation of the final report on the conference.
- Coordination of all post conference matters and closing of accounts.

APPENDICES

Conference name:

Date:

CONFERENCE BUDGET

Venue:

CODE	DESCRIPTION	Budget	Up-to-date status
	No. of Registrations		
	Number of Paying Delegates		
	Early Bird Registration	-	-
	Normal Registration	-	-
	Student Registration	-	-
	TOTAL NO. OF DELEGATES	-	-
Income		HK\$	HK\$
10010	Registration Income		
10011	- Early Bird Registration @\$x,xxx	-	-
10012	- Normal Registration @\$x,xxx	-	-
10013	- Student registration @\$xxx	-	-
	Income Sub-total	-	-
10020	Sponsorship	-	-
10030	Advertisement	-	-
	TOTAL INCOME	-	-
Expenditure			
20010	Venue Hire & Conference Equipment		
20011	Theatre & meeting rooms	-	-
20012	Equipment rental, technicians & provision for others	-	-
		-	-
20020	Onsite Decoration, Photography & Other Logistics		
20021	Banners & signages	-	-
20022	Photography	-	-
20023	Technical visits transportatoin	-	-
20024	Move-in/move-out expenses & other logistics expenses	-	-
		-	-
20030	Print, Design & Production		
20031	Call for papers & Registration brochure (total xxx copies)	-	-
20032	Printing of programme (@HK\$xx X xxx copies)	-	-
20033	Printing of proceedings (@HK\$xxx X xxx copies)	-	-
20034	Delegate kit - Conference bag (@HK\$xxx X xxx pcs)	-	-
20035	Miscellaneous (lapel badges, name plates, ad films etc)	-	-
		-	-
20040	Communications		
20041	Bulk mailing & lettershopping (for Call for Papers & reg brochures)	-	-
20042	Advertising	-	-
20043	Website design & construction	-	-
20044	General postage	-	-
20045	General local / international despatch services	-	-
20046	Telecommunication	-	-
		-	-
20050	Committees & Speakers		
20051	Committee and Meeting Expenses	-	-
20052	Speakers' expenses	-	-
20053	Speakers' souvenirs (@HK\$xxx X xx pcs)	-	-
		-	-
20060	Food and Beverage		
20061	Coffee/tea and refreshment (@HK\$xx X xxx persons X x days X x breaks per day)	-	-
20062	Luncheon (@HK\$xxx X xxx persons X x days)	-	-
20063	Banquet at hotel & provision for drinks (@HK\$xxx X xxx persons)	-	-
		-	-
20070	Personnel		
20071	Onsite personnel (Temp staff if needed)	-	-
20072	Out-of-pocket transportation expenses	-	-
20073	Administrative fee or PCO fee - full secretariat services	-	-
		-	-
20080	Contingency (10% of total expenditure)	-	-
	TOTAL EXPENDITURE	-	-
	PROFIT/DEFICIT	-	-

Conference name:

Date:

WORK PLAN

Venue:

Code	Major Tasks	Schedule (Target completion date)	Status (Status as of to date)	Committee (Committee which is responsible for the task)
1.00	Planning			
1.01	Decide Composition of Committees and Responsibilities	i.e.	i.e.	i.e.
1.02	Approve Prelim. Budget (for Admin Committee's approval, if required)	d - m - y	In progress	OC / Technical
1.03	Approve Work Schedule			
1.04	Decide Meetings Schedule			
1.05	Identify and Confirm Conference/Banquet Venue/Official Hotel(s)			
2.00	Call for Papers			
2.01	Decide Abstract/Paper Formats			
2.02	Despatch First Call for Papers and 1st Announcement			
2.03	Deadline for Submission of Abstracts			
2.04	Provisional Notice of Acceptance			
2.05	Deadline for Submission of Final Papers			
3.00	Conference Programme/Invited Speakers			
3.01	Propose and Decide Theme/Topics			
3.02	Work-out Preliminary Programme (Meetings/Functions/Visits)			
3.03	Propose and Invite Guest of Honour			
3.04	Identify and Invite Keynote Speakers and Other Invited Speakers			
3.05	Confirm All Keynote Speakers and Other Invited Speakers			
3.06	Confirm Programme Ready for 2nd Announcement			
3.07	Deadline for Submission of Final Papers from Invited Speakers			
3.08	Identify and Invite Session Chairmen			
3.09	Finalise Programme Sessions and Topics (Final Programme)			
3.10	Provide Speakers/Session Chairmen with Finalised Programme			
3.11	Provide Session Chairman with Notes and Abstracts			
3.12	Finalise Arrangement for Technical Visits			
4.00	Sponsorship			
4.01	Identify and Invite Potential Sponsors			
4.02	Confirm Major Sponsors			
5.00	Publicity			
5.01	Promote call for papers/registration			
5.02	Direct Mail Call for Papers and 1st Announcement			
5.03	Place Announcement in the HKIE Journal			
5.04	Activate Website for Call for paper/Programme/Registration Info			
5.05	Identifying Relevant Publications/Magazines for Publicity (if required)			
5.06	Direct Mail 2nd Announcement/Registration Brochures			
5.07	Report in the HKIE Journal			
6.00	Publication/Production			
6.01	Confirming Types of Souvenirs/Bags/Other Production Items			
6.02	Finalising Materials for Conference Handbook			
6.03	Finalising Materials for Conference Proceedings			
6.04	Conference Handbook/Proceedings Ready			
7.00	Registration/Hospitality Services			
7.01	Set Up Registration Database			
7.02	Deadline for Early Bird Registration			
7.03	Despatch Acknowledgment & Arrival Guide			
7.04	Review Hotel and Tours Booking Status			
7.05	Review VIPs/Speakers Arrival Schedules			
7.06	Arrange Airport Transfer and Other Transport Services			
7.07	Prepare Registration Kits and Documents			
7.08	Set Up Registration Desks			
8.00	Site Operation & Other Logistics			
8.01	Finalise all AV/Signages/Set Up Requirement with Venue Provider			
8.02	Finalise all Food & Beverage Requirement with Caterers/Hotels			
8.03	Finalise Decoration/Signage Plan			
8.04	Finalise On-site Operation Plan/Manpower Plan			
8.05	Liaise with Travel Agent re Transportation for Tours/Visits			
9.00	Wrap Up			
9.01	Issue Thank You Letters			
9.02	Distribute Proceedings			
9.03	Evaluate and Final Report			
9.04	Finalise Accounts (Submit Report to Admin Committee, if required)			

«Date of Letter»

«Author's Correspondence Details»

Dear «Title» «Surname»

«**Conference Name**»

«**Date**»

«**Venue**»

On behalf of the Conference Organising Committee, I would like to thank you for your submission of the paper entitled :

“«*Abstract*»” (Ref : «Abstract_No»)

I am very pleased to inform you that the paper has been accepted for oral presentation at the conference and publication in the Conference Proceedings. You are now invited to submit a full paper for inclusion in the Conference Proceedings.

Please study the enclosed Guidelines on Paper Preparation carefully and note that the deadline for submission of camera-ready paper is «**Date**». The completed paper (one camera-ready copy printed by a high resolution printer together with two additional hard copies) and the soft copy on diskette (Microsoft Office WinWord format) should be sent by post to the Conference Secretariat:

«Contact Person»

«Address»

Please also return the attached form in order to facilitate our selection process before «**Date of reply**». We will assume that you are not interested in submitting the full paper or in the oral or poster presentation if we do not hear from you after the deadline.

Presentation (either oral or poster) and publication of the selected papers are subject to full payment of registration fee by the presenting author(s).

Should you require any other information or special assistance, please do not hesitate to contact «Name of Person» on phone (852) «Telephone Number» or by email to «Email».

I look forward to meeting you at the conference.

Yours sincerely

Technical Programme Committee Chairman

Enc

Conference Name

Date

Venue

Guidelines for Preparing Full Papers

Conference Language: The official language of the Conference will be English. Paper must be written in English.

Paper Organisation: The full paper should consist of the following ten parts: Paper Title, Author's Name, Affiliation, Country, Abstract, Introduction, Body, Conclusion, Appendix, Reference and Biography.

Title: The title should clearly indicate the subject of the paper as briefly as possible.

Author's Name: Surname should be put in as the last name.

Affiliation: The organisation where the author currently works.

Country: The country where the author currently stay.

Abstract: An abstract is a collection of statements that comprise the essential qualities of the paper.

Introduction: The introduction orients the reader with respect to the problem and should include the nature, background, purpose and the significance of the paper.

Body: The body contains the primary message of the paper in detail. The author should focus on the object and communicate information efficiently and effectively to the reader.

Conclusion: The conclusion should cover the results, significance, limitations and advantage.

Appendix: Graphic or supplementary information may be included in one or more appendices.

Reference: The reference section should appear at the end of the paper. Citation should be complete and correct.

Biography: The author(s) biographies (about 50 words) may be included.

Format and Layout: The submitted papers should be prepared in Microsoft Office WinWord format with page set up to A4 (210 x 297 mm) size paper. The page layout should be in two columns format with a width of 7.875 cm and single-line spacing. For the page setup, it should have a top margin of 2.5 cm, bottom margin 2.5 cm, left and right margin 1.75 cm each.

All text paragraphs are justified. The preferred typeface is "Times New Roman" and pitch is "10". To maintain the style consistency, only the paper title is all capital with a pitch of "14", all heading and subheading should be in **bold** type and pitch "10". Text only under the Abstract section is *italic*. A sample page is enclosed in the Guideline for reference.

Abbreviations and Units of Measurement: When using abbreviations in the paper, the first mentioned abbreviations must be written in full name. S.I. units are to be used for measurements in the paper, as far as possible and applicable. **Editing and Publishing:** The Paper Committee may, as appropriate, edit the materials submitted by the author(s) for the Conference, as to tie up with the theme and style. The kind consent of all the corresponding authors is also assumed for permitting the Conference to publish all the papers/materials they sent for the Conference publication.

Submission of Full Papers: Authors are required to submit the full paper according to the above described format. The full papers must reach the Conference Secretariat by «Date». The submitted papers should be prepared in Microsoft Office WinWord format with page set up to A4 (210 x 297 mm) size paper. The total number of pages should not be more than **6 pages of A4 size paper for conference proceedings**.

The completed paper (one camera-ready copy printed by a high resolution printer together with two additional hard copies) and the soft copy in diskette (Microsoft Office WinWord format) should be sent by post to:

Conference Secretariat

Contact Person: xxx

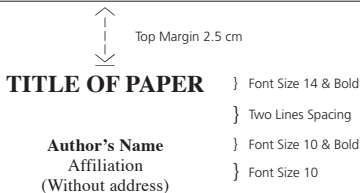
Address: xxx

Tel: xxx

Fax: xxx

Email: xxx

Website (if available): xxx



Abstract } Font Size 10 & Bold
} One Line Spacing

Font Size 10 & Italic

This paper is used to outline the method adopted for the preparation of the Conference Paper. Upon reading the first page of this sample paper, all writers should be capable of following the suggested format and style.

} One Line Spacing
1. Introduction } Font Size 10 & Bold

The purpose of this section is to enable the reader to understand the problems, issues to be dealt with in the paper. Normally, the nature of the problem, the background of previous work, and the purpose and significance of the paper are presented in this section. Where appropriate, the method by which the problem will be dealt with, the organisation of the material in the paper may also be included.

2. Body

Regarding the format of the paper, it should be arranged as shown in this two-column format. The style would be Times New Roman.

Regarding the format of the paper, it should be arranged as shown in this two-column format. The font is preferable to be Times New Roman.

- 2.1 Sub-heading
- 2.2 Sub-heading

3. Body Text Other 1

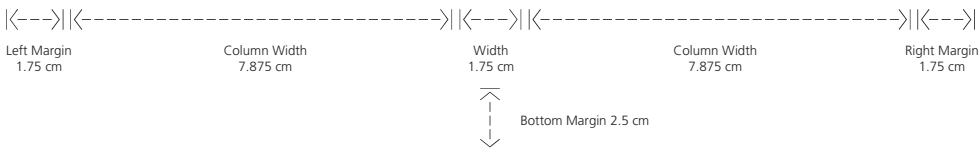
Regarding the format of the paper, it should be arranged as shown in this two-column format. The style would be Times New Roman.

} One Line Spacing



} One Line Spacing
} Font Size 10 & Bold
Fig. 1 HKIE's Logo

The style would be Times New Roman.



4. Body Text Other 2

Regarding the format of the paper, it should be arranged as shown in this two-column format. The style would be Times New Roman.



Fig. 2 HKIE's Logo

5. Body Text Other 3

Regarding the format of the paper, it should be arranged as shown in this two-column format. The style would be Times New Roman.

6. Conclusion

The conclusion should cover the results, significance, limitations and advantage.

Appendix (Optional)

Graphic or supplementary information may be included in one or more appendices.

Reference

The reference section should appear at the end of the paper. Citation should be complete and correct.

Biography

The author(s) biographies may be included (about 50 word).

«Date of Letter»

«Author's Correspondence Details»

Dear «Title» «Surname»

«Conference Name»

«Date»

«Venue»

I write to inform you that your paper is scheduled for oral presentation as follows:

Paper Ref No: «If any»

Paper Title: «Full title»

Date: «Full title»

Time: «Session to start»

Venue: «Session to be held»

Session: «Session name»

Time allowed: xx minutes for presentation followed by xx minutes of discussion time.

Enclosed is the updated Programme for your information.

We would be most grateful if you would complete the attached audio-visual equipment requirement form and return it to us **«Date of reply»**.

Also, for introduction purpose, we would appreciate it if you could provide us with a brief biography of yourself in about 100 words. This can be submitted by email to «Email» on or before **«Date of reply»**.

Meanwhile, I would also like to draw your attention to the following:

1. Please arrive early (at least 30 minutes before your presentation) for registration and collection of your conference kit and name badge if you will not be able to attend the full programme.
2. The first row of chairs in the meeting room will be reserved for you and other presenters.
3. Your Session Chairman will introduce you followed by your presentation.
4. For Computer and Overhead Projector users, it is advisable to do the set up between «Time» or during the coffee breaks and lunch immediately prior to your session.

If you have any further question, please do not hesitate to contact «Name of Person» on phone (852) «Telephone Number» or by email to «Email».

Yours sincerely

Technical Programme Committee Chairman

Enc

Conference Name

Date

Venue

Audio-visual Equipment Requirement Form

Return this form to
The Conference Secretariat

Fax: (852) «Fax Number»

I will require the following audio-visual equipment for my oral presentation:

- Overhead projector
- Slide projector
- Digital projector (for computer-aided presentation)
- If you will bring your own laptop computer for PowerPoint presentation, please tick this box.
- If you would like to make use of the computer provided by the organiser, please tick this box.

Important note: *We strongly advise you to send your presentation file to us in advance of the Conference. If your presentation file does not exceed 4MB, please e-mail your PowerPoint file to «Email». Alternatively you can save your document onto a CD and send it to the Conference Secretariat, clearly marked with the title of your paper. **All files should reach us before «Date».** They should all be in PC format and Microsoft Office WinWord.*

Reply from:

Name: _____

Tel: _____ Fax: _____

Email: _____

Date: _____ Paper Ref No: _____

Conference Name

Date

Venue

Guidelines for Poster Presentation

Poster Panel

Authors selected to present posters are allocated one display panel for the conference period. The display panel will be in the size of xxx mm (W) X xxx mm (H). (Your poster should not exceed the size xxx mm (W) X xxx mm (H)). There is no restriction of the paper to be used for preparing the poster but preferably in white background. The Organiser will provide appropriate fixings to enable you to mount your poster neatly and easily.

Format

Poster must have a heading including the title, author(s) and your institution. The text should be printed or typewritten and enlarged so that it can be read from a distance of at least 2 metres. There should be an introductory panel outlining the aims of the work succinctly. Results should be clearly shown and graphs and charts used wherever possible. Conclusions should be attached with acknowledgements and references if relevant.

Display Schedule and Location

Posters will be on display from «Date» to «Date» at the «Venue». Please note the following schedule:

Set up date & time:

«Date» From xxx to xxx «Time»

Please contact the staff at the Registration Counter when you arrive at the Conference venue to confirm the allocation of your poster board.

All posters will be removed at the close of the Conference. If you wish to redeem your poster, you must contact the staff at the Information Counter and to make your request before «Time» on «Date». The Organiser bears no responsibility for any damage or loss of the poster on display at the Conference.

Conference Name

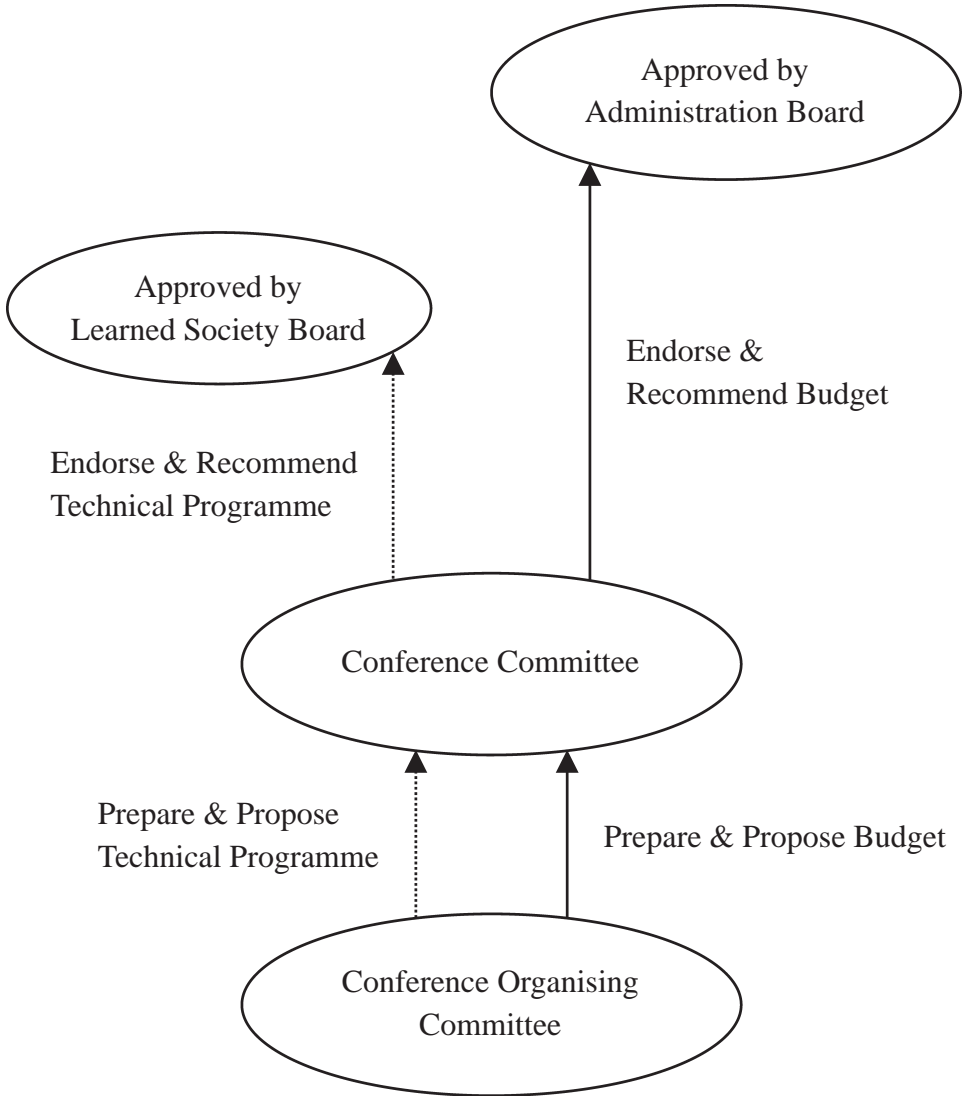
Date

Venue

Guidelines for Session Chairman

1. Please try to arrive the conference/meeting room 15 minutes earlier than the session start time to familiarise yourself with the stage and the equipment.
2. Please introduce briefly the programme of each session including any change of speaker or programme arrangement.
3. In order not to delay the proceedings of the conference, we specifically request your effort in starting the session punctually.
4. Each speaker will be given about «Allowed time for presentation» minutes on the topic, followed by «Allowed time for discussion» minutes for Q&A.
5. Please give a brief introduction of the speaker before each presentation.
6. Please remind the speaker if the presenter is running out of time.
7. After the presentation, please give a brief summary on the topics presented and invite discussion from the audience.
8. Please help to make any special announcements, if necessary.

Reporting Chart



**Request for Conference Support Service
From the HKIE Conference & Function Section**

**To be submitted to the Conference & Function Section
The Hong Kong Institution of Engineers**

Organiser: HKIE/Division*(Please specify) _____

Co-organiser(s), please list all

1. Name and Theme of Conference

2. The general theme will probably cover the following subject areas :-

3. The reasons for and objectives of the Conference are :-

4. Reasons why delegates should attend :

5. General Assumptions (please tick boxes) :-

The Conference will be: Local Asia Region International

Probable Year _____ Month _____ Number of Days _____

Organising work expected to start from _____

Venue : The HKIE HQ Hotel University HKCEC Others _____

If it will be held outside Hong Kong, please specify details: _____

With probably a Dinner/Banquet Reception

If a call for paper will be needed, what are the expected numbers from :

Overseas _____ Local _____

Sessions are expected to have (estimated numbers) :

Plenary _____ Parallel _____

Speakers are expected to come from (estimated numbers) :

HK _____ Overseas _____

Delegates are expected to come from (estimated numbers) :

	Academic	Industry	Others	Total Estimated
HK	_____	_____	_____	_____
Overseas	_____	_____	_____	_____

Will the HKIE be totally responsible for funding?

- Yes (please specify details or provide a preliminary budget)
- Providing Cash Flow Sharing Profit/Loss
- No

Please indicate if there are other sources of funding

- Sponsorship Exhibition Others _____

What will be the treatment if there will be a surplus/deficit from the Conference?

What is the registration fee? HK\$ _____ Any discount to HKIE members? Yes No

Did HKIE previously organise a similar event? Yes No

e.g. date, venue, delegate number. _____

Scope of Services expected from the Conference & Function Section

- | | |
|--|--|
| <input type="checkbox"/> Registration / Delegate Services | <input type="checkbox"/> Call for papers and Processing |
| <input type="checkbox"/> Sponsorship | <input type="checkbox"/> Marketing Communications |
| <input type="checkbox"/> Venue Liaison / On-site Management | <input type="checkbox"/> Food & Beverage Arrangement |
| <input type="checkbox"/> Social Programme (Dinner / Reception) | <input type="checkbox"/> Publication (Programme / Proceedings) |
| <input type="checkbox"/> Travel Services (Hotels/Tours) | <input type="checkbox"/> Exhibition Services |

Submitted by

Conference Organising Committee Chairman:

Name: _____

Signature: _____

Date: _____

Phone: _____

Endorsed by

LSB Chairman/Division Chairman:

Name: _____

Signature: _____

Date: _____

Phone: _____

Please attach a list of the composition of the conference organising committees and any relevant information about the event, which will be useful for the evaluation.

<i>For Office Use Only</i>	<i>Conference secretariat services will be provided</i> <input type="checkbox"/> Yes <input type="checkbox"/> No
<i>Remarks/ Recommendations (if any)</i>	